



PATTERNMAKERS



Audience Outlook Monitor

Australian Capital Territory Snapshot

December 2022



ACT
Government

Live Attendance Outlook

Audience behaviour will continue to evolve as a range of new factors impact the path to recovery, according to data collected in October 2022 from 385 ACT past attendees.



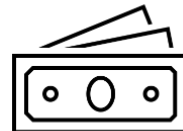
67%

are 'ready to attend now', up from 54% in August '22, the highest since March 2021.



50%

are still attending performing arts events less than they used to, pre-pandemic, so full recovery remains a way off



58%

are spending \$50+ on cultural events, with spending not increasing on March '22 levels (57%)



32%

now cite financial reasons as a barrier to attendance, compared to only 10% in March 2022.

Key trends



56%

expect their attendance will increase over the next year, while 37% say it will stay the same



22%

say there has been a change in their preferred time, day or location of cultural events



77%

will be attracted to fun, uplifting content, while 58% are drawn to 'big name' acts and performers



55%

want to try new things they haven't experienced before.

Key findings

ACT audiences are attending more than other states, but a range of factors will influence recovery

- ▶ Australian Capital Territory (ACT) audiences are rebuilding their confidence, according to the October 2022 data from 385 past attendees. 67% say they are 'ready to attend now,' up from 54% in August and 53% in March 2022. However, they are among the most cautious nationally, along with VIC (66% 'ready to attend'). Three in 10 (30%) are being more selective, and say they'll attend events or venues where they're reasonably confident the risks of transmission are minimal.
- ▶ ACT audiences are some of the most likely to be attending right now: 8 in 10 (81%) attended a cultural event recently (12-16 October 2022), one of the highest rates in the country, along with NSW (79%).
- ▶ Attendance frequency is yet to return to pre-pandemic levels: 50% of ACT performing arts attendees are attending less often than they used to, higher than the national average (44%).
- ▶ Spending levels are not increasing, likely due to increasing financial pressures as the costs of living rise: 58% spent over \$50 on arts and culture in the fortnight before data collection, consistent with March 2022 (57%).
- ▶ Full recovery will take time: while most ACT audiences are feeling confident and optimistic, there are complex factors at play, including re-entry anxiety, economic barriers, and lifestyle changes.

Behaviours, lifestyles, and tastes continue to evolve – and 55% of ACT audiences say they will be drawn to new experiences

- ▶ ACT audiences are optimistic about future attendance. Over half (56%) expect to attend cultural events more often in the next year.
- ▶ However, a range of barriers are preventing ACT audiences from attending. ACT audiences are the most likely nationally to name the risk of the virus as a barrier (45%). Some are also perceiving a lack of appealing events (36%), are prioritising other things in their lives now (23%), or are experiencing a lack of energy to go out (20%).
- ▶ Price sensitivity may increase, as financial reasons are affecting 32% of ACT audiences – now a far more significant barrier to attendance, compared to March 2022 (10%).
- ▶ Last-minute ticket purchases are here to stay. Qualitative data reveals that ACT audiences continue to weigh up factors like the implications of cancelled events and the risk of the virus when making purchasing decisions.
- ▶ Scheduling preferences have changed for 22% of ACT audience members, whether it's the time, day or location of events.
- ▶ Cultural tourism is slow to recover to pre-pandemic levels. Although ACT audiences are the most likely to be travelling interstate (25%) to attend events, local attendance remains the most common (81%).
- ▶ ACT audiences have an appetite for uplifting (77%), new (55%), and 'big name' (58%) cultural experiences – so balanced programs are key as audiences re-emerge in the 'new normal'.

4 in 10 are participating in the arts online – with virtual opportunities vital for accessibility

- ▶ Online channels continue to be immensely important in connecting with ACT audiences and improving accessibility.
- ▶ Digital marketing is paramount for live events and 82% of ACT audiences are using online channels, such as eNews (54%) and websites (51%) to find out what's on. Audiences under 35 are most likely to be discovering events via websites (59%) and word-of-mouth (59%).
- ▶ Online participation in cultural activities is stable. 38% of ACT audiences participated in some kind of online arts recently, such as watching pre-recorded video of a performance or event (19%), doing online class/lecture/tutorial (19%), or watching a live-streamed performance or event (12%).
- ▶ Spending on digital activities is not increasing, consistent with the stability in cultural spending overall: 33% of digital attendees paid for an activity recently, down from 38% in March 2022. Among those paying, 30% spent over \$50 (down from 54% in March 2022).
- ▶ Most audiences continue to see a role for digital, with 74% of ACT attendees saying these experiences continue to play a 'small' (55%) or 'significant' (19%) role in their life – though this has declined slightly since March 2022 (down from 78%).
- ▶ Online cultural participation is higher among audiences who are more risk-averse (52% in ACT participating online), as well as those aged 75+ (47%), and those who are vulnerable to COVID-19 (51%) – demonstrating that digital events are vital to accessibility. Accessibility will be explored in detail in an upcoming Fact Sheet and set of case studies.

Introduction

About the ACT sample

This Australian Capital Territory (ACT) Snapshot Report outlines key findings from the October 2022 phase of the Audience Outlook Monitor in Australia (Phase 8), based on data collected from 385 audience members living in the ACT.

On 12 October 2022, participating organisations simultaneously sent the Phase 8 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

This report compares the new results with data collected previously in July 2021 (Phase 5), November 2021 (Phase 6), March 2022 (Phase 7), and the August 2022 ‘Pulse Check’ to examine how things are changing over time. Where relevant, the ACT results are compared to those in other states/territories, noting that results for the Northern Territory (NT) and Tasmania (TAS) are not reported separately due to small sample sizes in those areas.

In addition to this Snapshot Report, the October 2022 results are accessible in a free interactive dashboard. Users can explore the data for different artforms, types of events and demographic groups in all parts of Australia. For more information about the study, and to access resources such as the dashboard, visit: www.thepatternmakers.com.au/covid19.

Read on for the key October 2022 findings for the ACT.

Image Credit: Joseph Tawadros, courtesy of The Street Theatre.

Attendance Outlook

After a challenging year in 2021, the impacts of the pandemic endure in the ACT – with average participation frequency lower than before COVID-19

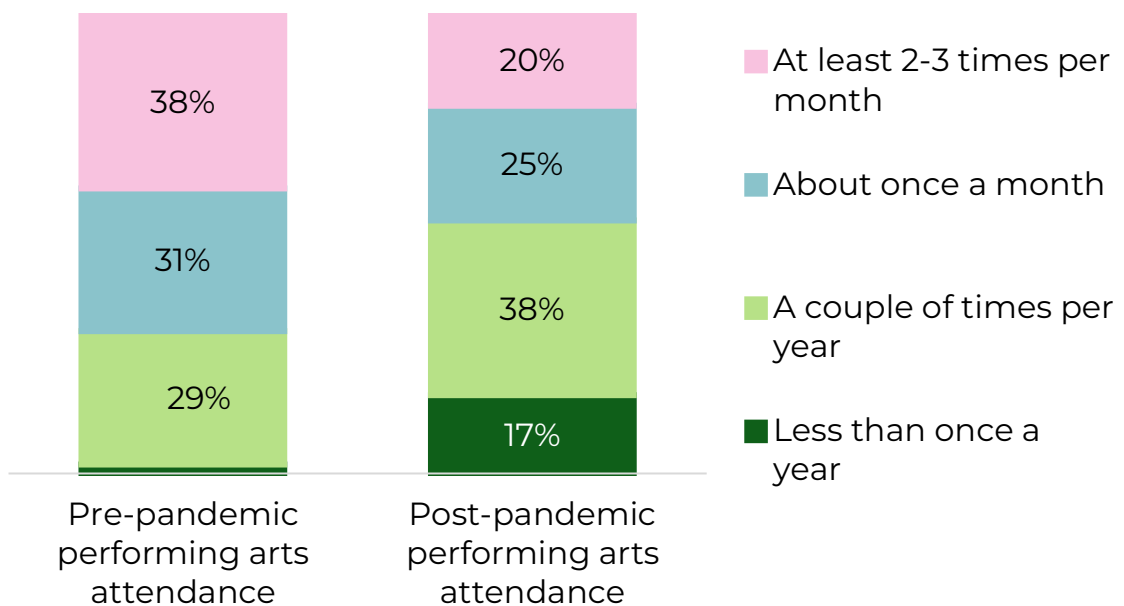
This Phase of the Audience Outlook Monitor sought to compare attendance frequency in the 'new normal' to pre-pandemic activity.

Overall, half (50%) of ACT performing arts attendees are attending less than they did pre-pandemic.

Looking at it in terms of frequency, pre-pandemic, 7 in 10 (69%) performing arts attendees said they attended regularly (once a month or more).

Now the proportion attending performing arts regularly (once a month or more) is only 45%. It's more common that audiences are attending performing arts only a couple of times a year or less (55%).

Figure 1: Pre-pandemic, roughly how often did you attend performing arts events? And now, roughly how often do you attend performing arts events? ACT audiences (n=377)

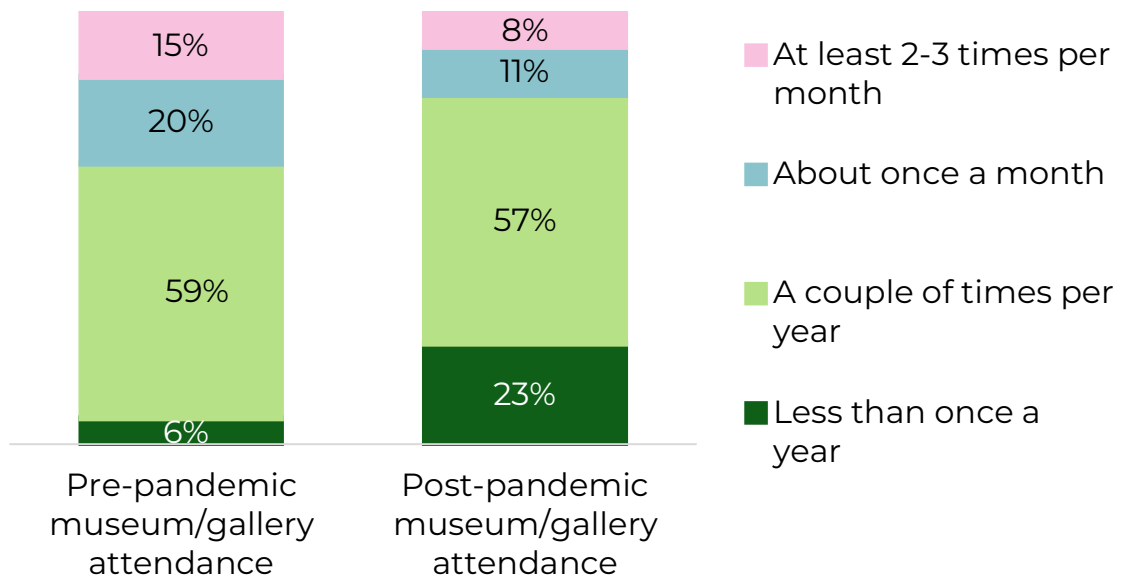


Similarly in terms of museums and galleries, 36% of museum and gallery visitors are attending less than they did pre-pandemic.

In terms of frequency levels, 35% of audiences were regular visitors pre-pandemic – attending at least once per month.

Now, 19% of museum and gallery attendees are visiting this often – and it is more common to visit a couple of times per year or less (80%).

Figure 2: Pre-pandemic, roughly how often did you attend museums and galleries? And now, roughly how often do you attend museums and galleries? ACT audiences (n=354)



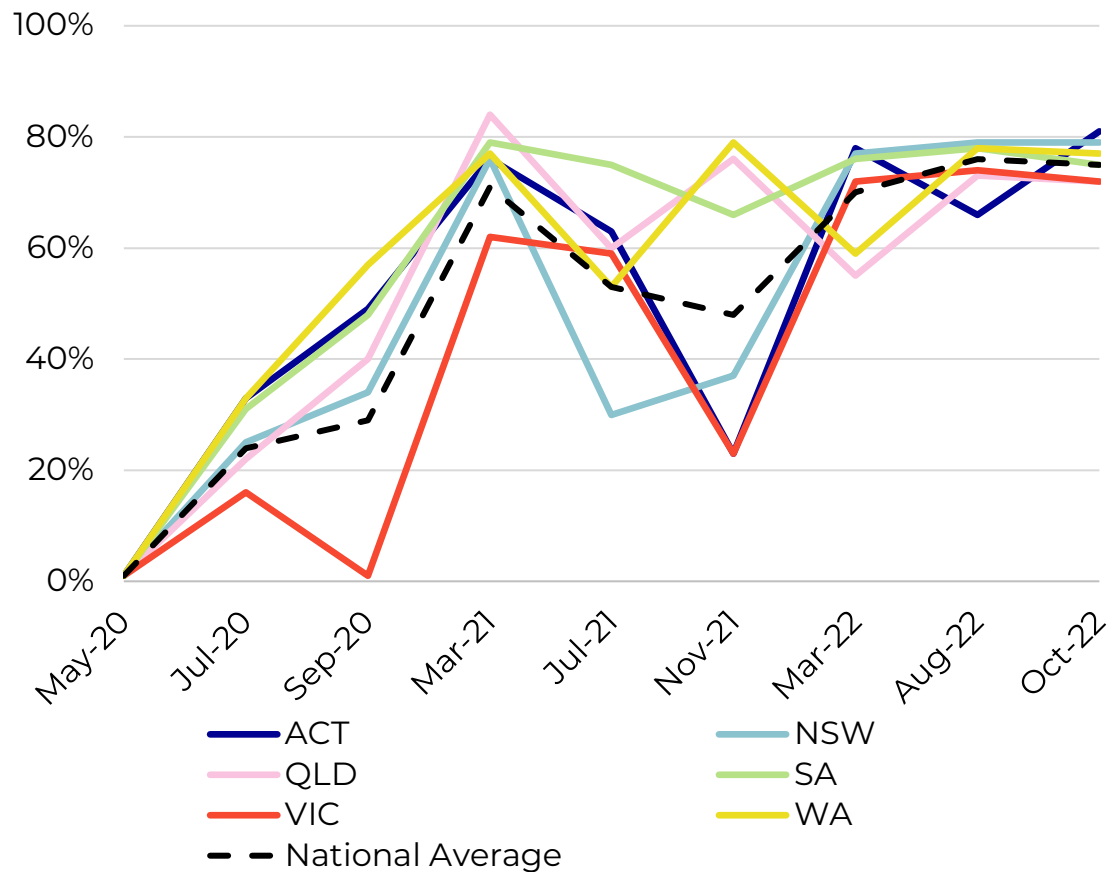
Attendance levels in the ACT are the highest in the country, with 8 in 10 ACT audience members recently attended an arts or cultural event in-person

8 in 10 (81%) ACT audience members attended a cultural event in the fortnight prior to data collection, up from August (66%) and March 2022 (78%), as shown in Figure 3.

These rates are a significant improvement from July 2021 (63%) – when ACT residents were experiencing high case numbers and approaching a lockdown – and November 2021 (23%) – when ACT residents emerged from lockdowns.

Attendance in ACT is the highest in the country, followed by NSW (79%). These states/territories are recovering more quickly compared to VIC (72%), for instance, which also underwent extended lockdowns last year.

Figure 3: Proportion of audiences who attended a cultural event in the fortnight before data collection, by state/territory, May 2020 to October 2022 (n=5,438)



Qualitative data suggests that some ACT audience members feel newly positive in the current context. One ACT respondent said,

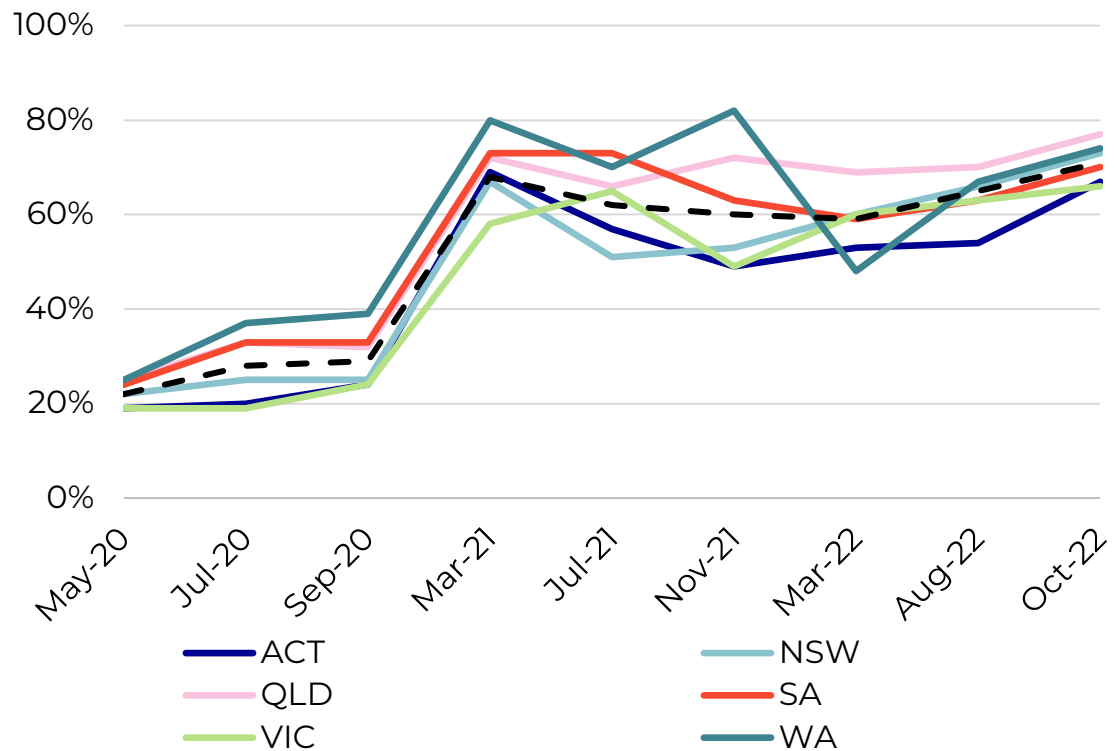
‘It has been a relief to finally get back to cultural events. Really missed meeting friends at cultural events and missed live music and plays and visiting galleries in person to see what artworks look like up-close.’

Two-thirds of ACT audiences feel safe attending events right now – the main challenge being building frequency, rather than converting non-attendees

Only a small proportion of ACT audience members aren't willing to go out right now (2%). Two-thirds (67%) are willing to attend 'now' – up from 54% in August and 53% in March 2022 – the highest proportion since March 2021 (69%) – rather than when 'reasonably confident the risk of transmission is minimal' (30%)

Comfort levels among ACT audiences are most similar to those in VIC (66% ready to attend). Meanwhile, QLD (77%) are the most risk-tolerant of any state/territory, along with WA audiences (74%) – consistent with trends throughout the pandemic.

Figure 4: Proportion of audiences who are 'ready to attend now or as soon as permitted', by state/territory, May 2020 to October 2022. n=5,438



With risk tolerance increasing as the situation changes, the main challenge now is building frequency and spending.

Among ACT audience members who are attending, 58% spent \$50 or more on arts and cultural events in the fortnight prior to data collection, the lowest rate nationally. This has remained stable since March 2022 (57%).

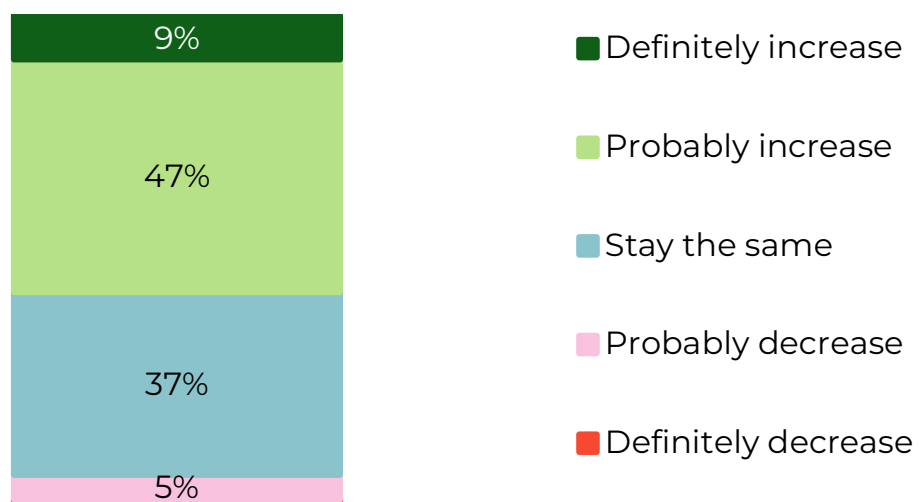
ACT audiences are among the most likely to say they expect to attend more – though one-third say it will stay the same

Things are slowly improving, and ACT audiences are much more likely to be increasing their attendances than decreasing them over the next year.

Over half (56%) said their current level of attendance will definitely (9%) or probably increase (47%) — the highest rates of any state/territory, followed by NSW (55%) and VIC (53%). However, plenty will be maintaining their current levels, and 37% said it will stay the same.

Only 7% expect their attendance will probably (5%) or definitely (2%) decrease.

Figure 5: Over the next 12 months – do you see your current level of attendance at cultural events and activities changing? ACT audiences (n=383)



While optimistic about their future attendance, several ACT audience members said they would continue to take precautions. One shared,

'Pre-pandemic, I attended a wide variety of live shows: musicals, dance, comedy, drama, and various community events. In current 'post-COVID' times I am slowly loosening up, (seeing a live show in about two weeks), BUT I've had all the booster shots, watch the news, and keep a mask or two in my pocket, just in case.'

Another said,

'I will be very happy to get back to attending all the activities I did prior to COVID, and of course to experience new and exciting activities. But I'm always mindful of safety and good health where necessary.'

Others are eager to show support, as one said,

'I feel starved of cultural and arts events due to lockdowns and so want to patronise artists and cultural institutions who've taken a huge financial hit. It's our duty to spend money to support these people and organisations.'

Behavioural trends

1 in 5 ACT audience members said there's been a change to their preferred time, day or location of events since COVID-19 – with pandemic lifestyle changes taking root

1 in 5 (22%) ACT audience members said their preferences in the day, time or location of events have changed, fairly consistent with the national average (19%). Meanwhile, two-thirds (66%) said they have not.

Preferencing events at quieter and less popular times was frequently mentioned – sometimes for reasons of COVID-safety, but sometimes also because audiences have lost their appetite for bustling and crowded environments.

One ACT audience member said,

'I will only consider going if I can minimise the risk of COVID - for some events or venues, this might be possible e.g., first thing in the morning on a weekday. If venues/events would hold masked sessions, I would be much more comfortable going then.'

Another said,

'I try to go early in the day to avoid crowds, or on a weekday when it is less crowded.'

Some ACT audiences said that the pandemic has made them more selective about which cultural events they choose to attend, as one said,

'I've found attending the arts again a great relief but also find that, now things are happening again, there is SO much competition for my theatre attendance. I've actually had to be much more selective in what I see lately.'

Qualitative data suggests that last-minute ticket buying remains a trend to watch, particularly as unpredictable weather continues

Qualitative data from October 2022 suggests that there's still residual anxiety around planning ahead, and last-minute planning is likely to be another pandemic holdover. One ACT audience member said,

'[After having multiple events cancelled] now I feel almost a psychological aversion to buying tickets because I don't want to experience all that disappointment again. It's nobody's fault, and I feel terrible that performing arts institutions are suffering, but I really struggle to bring myself to get excited about buying tickets and going to performances now. It's very sad.'

For some ACT audiences, this is compounded by the availability of refund policies in light of unexpected events, as one mentioned,

‘It’s taken me a while to be able to commit to buying tickets in advance due to fear of cancellations or missing out if I get COVID/have to isolate. It would be good if all venues offered refunds in such cases - may also help stop infected people from persevering with attending in some cases.’

As many ACT audiences often travel to major cities such as Sydney to attend cultural events, concerns relating to changing travel plans and accommodations compound some people’s aversion to booking tickets in advance. One said,

‘[There should be] flexible provisions if purchased event is later cancelled because of COVID. At present it’s too risky committing to expensive tickets (plus travel and accommodation).’

It seems likely that for many attendees, last-minute booking is here to stay – and there may be a need to plan accordingly.

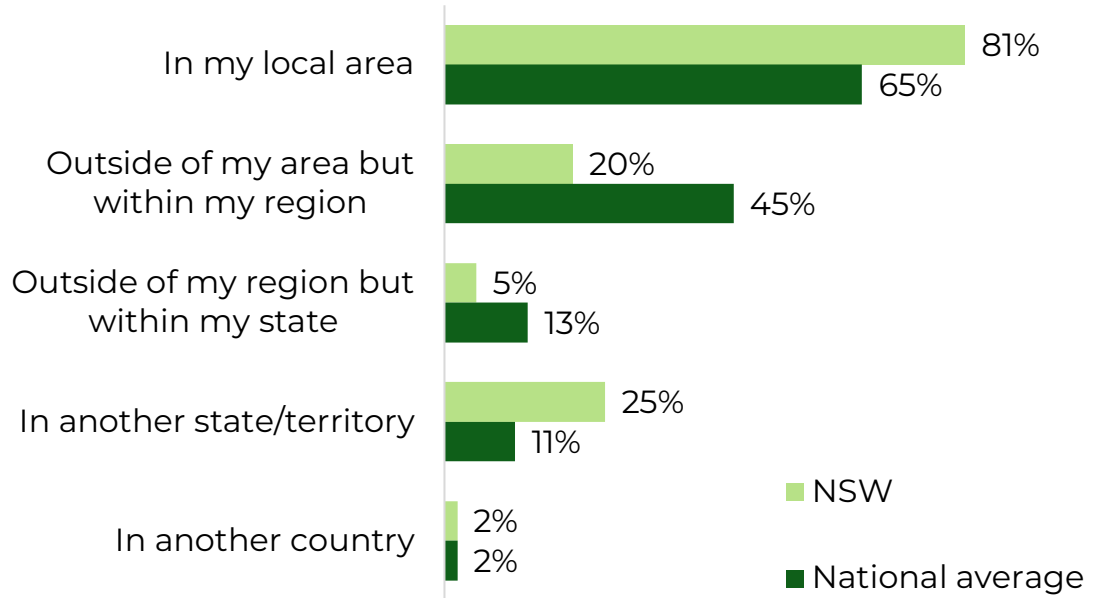
One-quarter of ACT audiences are travelling to attend events interstate – but full recovery will take time

Audiences who had attended arts and cultural events in the last fortnight were asked where these events were located.

While the largest proportion of ACT audiences had attended events in their local area (81%), they are currently the most likely of any state/territory to be travelling to another state or territory (25%), compared to the national average of (11%) (Figure 5 Figure 6).

One-fifth (20%) are attending events outside of their area but within their region.

Figure 6: Were any of the activities you attended in the past fortnight outside of your local area? (Select all that apply). ACT audiences (n=301) and national audiences (n=3,934)



However, full recovery may take time. According to [tourism research by Visit Canberra](#), domestic visitors to ACT in FY'22 were down 14.9% compared to FY'21, and were two-thirds (62%) of what they were pre-pandemic (FY'19).

Barriers

Financial reasons are now a significant barrier to attendance – inhibiting one-third of ACT audience members

When asked if anything was likely to prevent them from attending as they used to over the next 12 months, 32% of ACT audiences named 'financial reasons' as a barrier (up from 10% in March), along with the risks of COVID-19 (45%), as shown in Figure 7.

This is a departure from previous phases when the risk of the virus outstripped other barriers.

One ACT attendee commented,

‘The biggest deterrent is cost with the current financial climate.’

Although the ACT is least likely of any state/territory to cite financial barriers, rising cost-of-living pressures are leading to price sensitivity among some audience members. One respondent said,

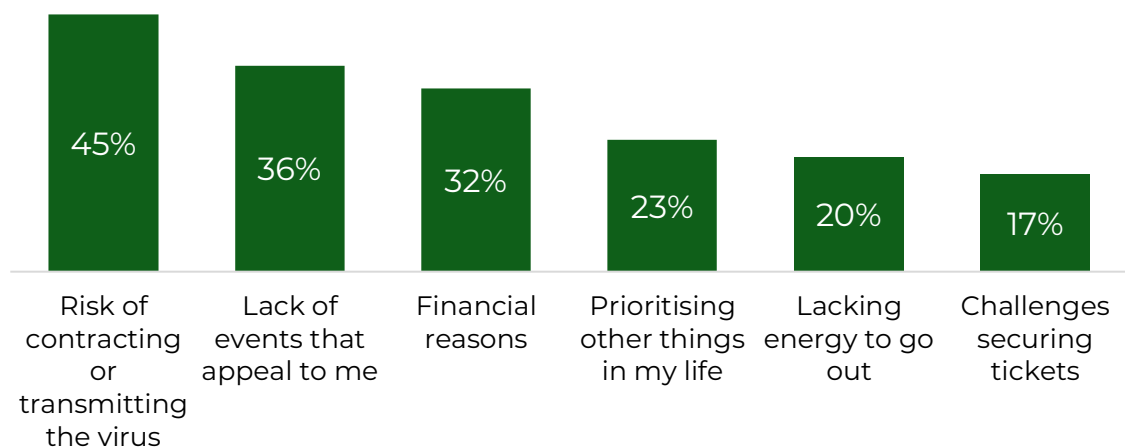
‘The cost of theatre tickets is becoming too expensive. The tickets, accommodation (interstate), travel, and food are putting some productions out of reach financially. That, combined with health concerns, is a major disincentive.’

Another said,

‘[The] rise in cost of living and house prices means I don't have the same disposable income to spend on the arts as I did before the pandemic but I am very much trying to get to as many events as possible to support the sector!’

The virus continues to play a role in decision making, with ACT audiences the most likely to name the risk of contracting or transmitting COVID-19 as a barrier to attendance (45%, compared to the national average of 38%).

Figure 7: Still thinking about the next 12 months... Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past? (select up to three). ACT audiences, October 2022 (n=384)



There are other key factors at play, and ACT audiences are among the most likely to perceive a lack of appealing events (36%)

New options introduced in Phase 8 explored the complex factors affecting attendance in the 'new normal': physical fatigue from COVID-19 itself, mental fatigue from the anxiety and uncertainty of the past three years, new and competing priorities such as spending time with family or domestic/international tourism, and changes in the availability of events.

Along with QLD audiences (36%), ACT audiences were the most likely of any state/territory to say that they perceived a lack of appealing events (36%, compared to 32% nationally). One said,

'More live music in Canberra please!!'

Another said,

'Have got used to Netflix and other sources for movies, and local theatre is not attracting me. Still awaiting 'Come from Away' - cancelled twice!'

However, with regular programming re-commencing, some people are experiencing an overwhelming amount of choice – and instances where they are missing out on things. One said,

'If anything, there are too many events now, sometimes 2 or 3 bands I would like to see are playing on the same night.'

Some mentioned experiencing challenges finding out about what's on:

'The ACT requires a reliable and up-to-date one stop shop for all events. Don't care if [it's a] webpage or newsletter. I mostly only find out about events when reading a review on them.'

Another said,

'There have been so many rescheduled arts events that it's hard to get into my own rhythm. Sometimes it's hard to know what's on without getting spammed by all the institutions.'

One-quarter (23%) said they were prioritising other things in their life and 1 in 5 (20%) are dealing with exhaustion, lack of energy, or 're-entry' anxiety. One said,

'Tiring workloads and pressures make going out more difficult and energy-draining.'

Another said,

'The pandemic made me more of an introvert, so I get more tired going out now.'

Some mentioned being out of the habit of booking events, as one said,

'I got into the habit of not making plans during the pandemic and it now feels [like] more effort. Looking forward to breaking that pattern.'

Comfort and COVID-safety

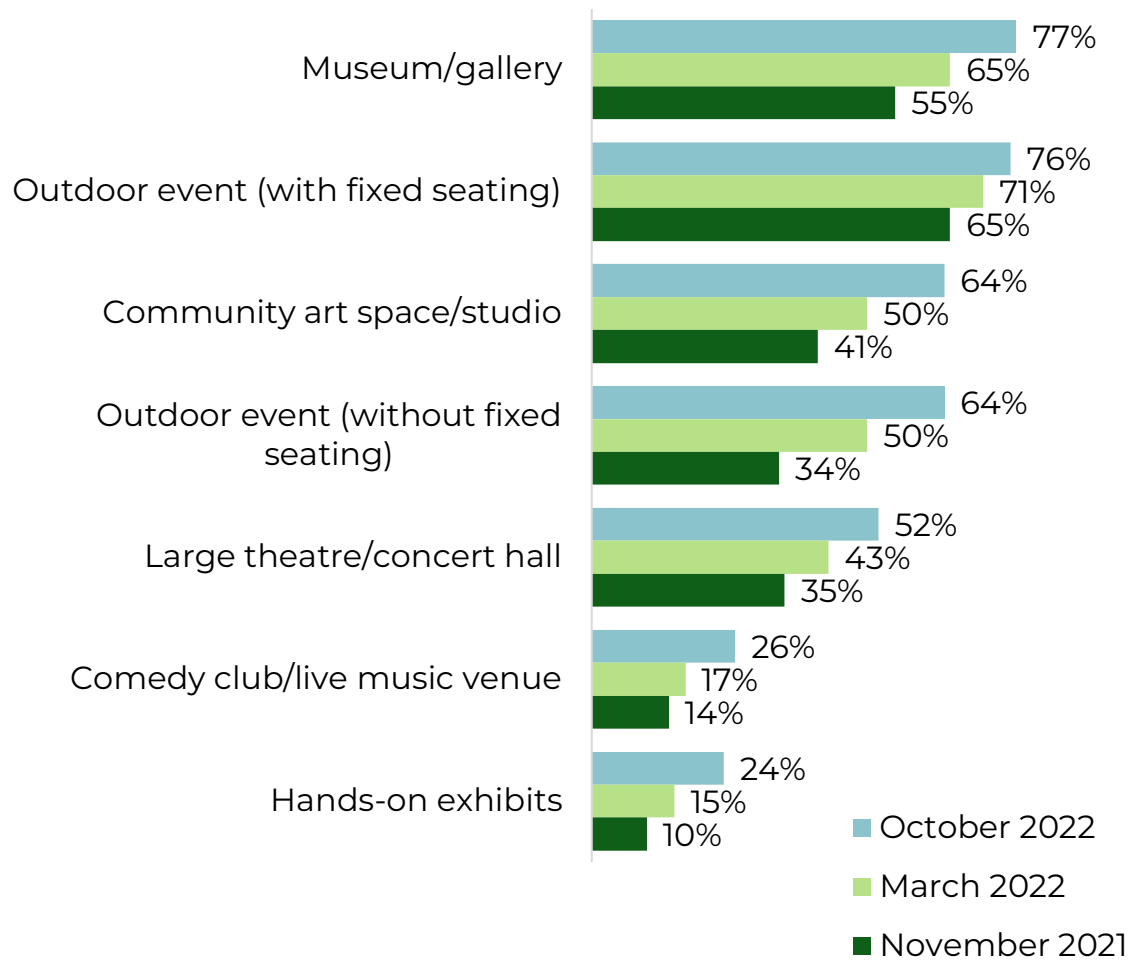
Most venues are seen as safe, and comfort at live music venues and interactive exhibits is at an all-time high

Since March 2022, the majority of ACT audiences are comfortable attending all types of arts venues, including museums and galleries (77% 'very comfortable', up from 65% in March 2022), large theatres and concert halls (52%, up from 43%), and outdoor events with fixed seating (76%, up from 71%) (Figure 8).

While typically considered riskier by audiences, the level of comfort with hands-on exhibits and comedy clubs/live music venues has increased and is now at the highest level since the pandemic began.

One-quarter (24%) of ACT audiences are 'very comfortable' using hands-on exhibits (up from 15% in March 2022), as well as attending comedy clubs and live music venues (26%, up from 17% in March 2022).

Figure 8: Proportion 'very comfortable' attending cultural venues. ACT audiences, November 2021 to October 2022 (n=384)



As isolation rules relax, COVID-19 caution continues to inhibit almost half (45%) of ACT audience members

As discussed previously (Barriers), COVID-19 remains a significant barrier for some audience segments. While smaller than in recent phases of data collection, such as March 2022 (59%) and August 2022 (61%), a sizeable proportion (45%) of ACT audiences continue to say the risk of contracting or transmitting the virus will prevent them from attending cultural events.

There are several factors at play, including the effects of long COVID, fatigue, the possibility of cancelled events and [the newly scrapped isolation rules](#).

One said,

'I am comfortable with resuming activities but remain concerned about contracting the virus, so I still look to see aspects of ventilation and spacing, especially in foyers.'

The level of concern increases among audiences with a health vulnerability, as one mentioned,

'As a person with a disability, I am anxious about getting sick. Masks, social distancing, etc. helps to reduce that risk. Some venues are too crowded and too risky now that masks are no longer mandated.'

Some are remaining cautious about attending live events when they have important engagements, such as travel or family milestones, coming up. One said,

'If myself and family members are about to undertake something important, we might tend to stay home to minimise risk of illness.'

Most audiences are using their own discretion around COVID-safety, and opting to wear masks when necessary

In October 2022, audiences were asked, 'what are your current feelings about wearing a mask in cultural venues in your local area, where masks are optional and not required?'

The majority of ACT audiences said they 'may or may not wear a mask, depending on the situation' (67%) – signalling that despite relaxed restrictions, most audiences are willing to implement safety precautions based on their perceived level of risk.

Some ACT respondents advocate for mask-wearing requirements — with one suggesting a seasonal approach,

'I would like to see seasonal risk management processes put in place - for example, during winter when risk of transmission of flu/COVID is highest, I would like to see visitor caps, increased hygiene practices, increased use of masks encouraged.'

However, ACT audiences are more than twice as likely to say they 'never wear a mask' (23%) than they are to say they 'always wear a mask' (10%).

Programming preferences

Many ACT audience members are keen to return to the things they love following two years of disruptions

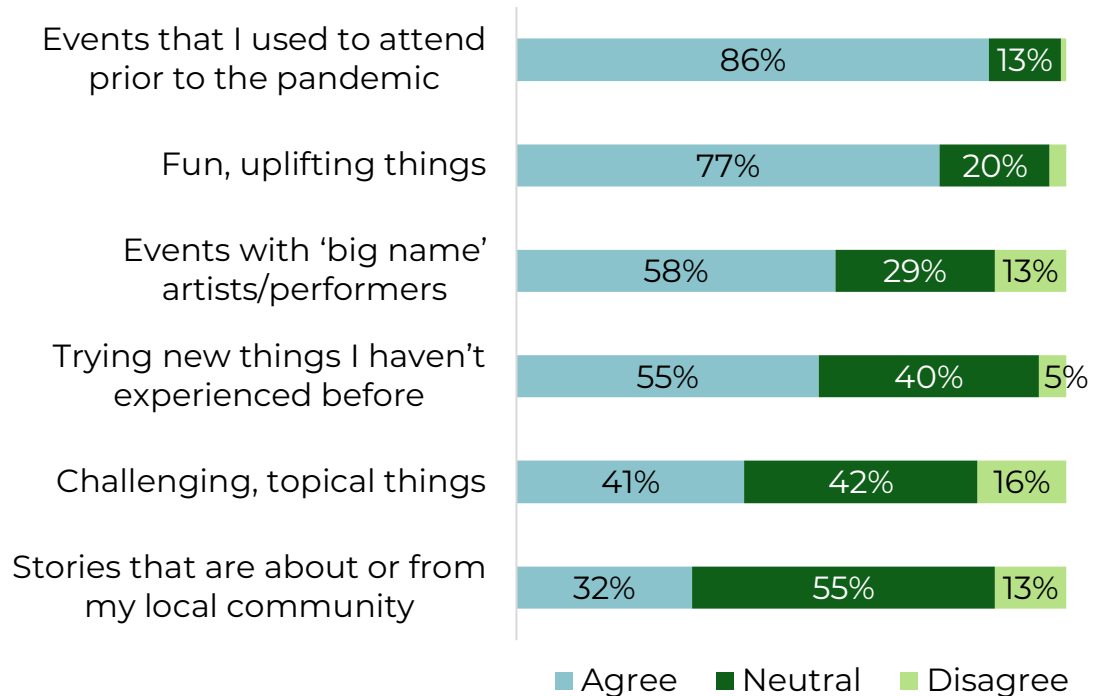
In terms of content, over the next year audiences generally agree they want to attend things that they used to attend in the past (86%), with many striving to make up for lost time (Figure 9). One said,

'I am really looking forward to getting out and about, and to attending my usual live events, especially my favourite live theatre shows at the Canberra Theatre.'

However, some have assessed their priorities post-pandemic, opting instead for 'safer' alternatives compared to their usual preferences. One said,

'Concerts that I used to attend in a 'mosh pit' type vibe I am now not very keen on, because even if people are sick I think they will still go. I really miss it but it doesn't seem worth it.'

Figure 9: In the coming year, I'll be most attracted to ... ACT audiences (n=382)



There is an appetite for new, uplifting, or challenging cultural experiences

There is also appetite to engage with new content. More than half (55%) of ACT audiences agree that they would like to try things they haven't experienced before. One respondent commented,

'My tastes are very broad and I'm interested in lots of different things. So while I will attend events I've been to before, I will likely go to one-off shows or other events I've never been to before.'

Another said,

'I like a range of genres (e.g. dance, plays, music, comedy, circus, Indigenous cultural experience) and shows that are creative and offer new experiences and new perspectives.'

Others expressed appetite for greater risk-taking, experimentation and emerging or fringe acts:

'I miss experimental and risk-taking art... the work which is being shown at the moment is quite conventional and safe.'

Another said,

'Fringe arts are at risk of dying out and a real investment needs to be made now to drive our fringe and alternate performing arts communities to ensure their continuation and that they flourish. Grant programs where many artists beg for small amounts of money that are routinely distributed to the same handfuls of people are not providing the benefit to build a diverse and strong community.'

ACT audiences are the most likely to want fun, uplifting things – though with 41% also drawn to challenging things, there is a need to continue balancing programs

Three-quarters (77%) of ACT audiences agree that they'll be most attracted to fun, uplifting things over the coming year – a continuing trend that suggests strong demand for connective, morale-boosting, and light-hearted experiences.

This rate is among the highest of any state/territory – and one respondent mentioned that their preferences are inclined to uplifting content, but not necessarily for the sake of entertainment:

'It feels like community and healing are more important than being entertained.'

The last few years have been challenging for many ACT audience members – and with the nature of the current news cycle, some suggest they'll be they're seeking refuge in art. One said,

'The last two years have been so depressing I would like to see or experience performances and events that lift my mood.'

But 4 in 10 (41%) agree that they'll be drawn to topical, challenging content, signalling that while many ACT audience members are seeking uplifting content that offers reprieve from a difficult few years, there is a need to continue offering varied, balanced programs. One person noted,

'I don't need fun, uplifting things, but I do need to be intrigued, challenged and informed.'

58% of ACT audiences agree they're most attracted to 'big names' — while some are prioritising quality over reputation

As touring picks up, almost 6 in 10 ACT audiences (58%) agree that they'll be drawn to events with 'big name' artists and performers. This rate is among the highest in the country, similar to SA audiences (57% and behind QLD audiences (67%) One said,

'I am looking forward to big name events and festivals with large crowds and excitement, because that is what I have missed the most during the pandemic.'

Another said,

'Just waiting for the big names to come back in the same way they did before! Especially to events in regional areas or at least outside Sydney and Melbourne.'

One mentioned that they are happy to travel to see the big acts they enjoy:

'Big name artists might be people I've always wanted to see but didn't have the opportunity. This includes travelling out of ACT if necessary. After the lockdown restrictions, I'm keen to see all types of cultural events & I seek them out.'

However, 13% disagree, and qualitative comments suggest a perception that big names don't necessarily equate to a high-quality experience. One said,

'I don't need big names, but I do like professionally run events.'

Local loyalty continues to play a role— though ACT audiences are eager to experience touring work

One-third (32%) of ACT audiences are also drawn to stories from and by their local community. Some mentioned appreciation for their local areas becoming re-invigorated, and a desire to sustain this post-lockdown.

One ACT audience member said,

‘Support local acts. Support emerging artists.’

Another said,

‘Very interested in performances grounded to the local area.’

However, while there is strong local support, many are also keen to expand beyond the local, as one said,

‘I think there's an element of wanting to do what I used to, whilst wanting to do things I hadn't done before the lockdown - to get out of the lockdown rut.

It's not so much about 'names' and not so much about local (as we've been living local; our worlds got smaller throughout the pandemic). It's the desire for a taste of other worlds/places, sometimes getting outside of my comfort zone and definitely looking for the uplifting and funny side of things.’

Online participation

Websites, word of mouth and emails from organisations are key awareness channels for audiences of all ages

When asked how they found out about the most recent show or performance they attended in the past fortnight, 82% of ACT past attendees cited online channels, particularly direct emails from arts organisations (54%) and websites (51%), consistent with trends around the country.

For ACT audiences under 35, websites (59%) and word of mouth (59%), as well as social media such as Facebook (41%) and Instagram (25%), were the most common sources of awareness.¹

Among older segments such as those aged 65-74 and over, emails from arts organisations are the dominant source of awareness (64%),

¹The sample sizes for these age groups are small (<100 respondents per category), so these results should be interpreted with caution.

and audiences rely less on word of mouth (34%), websites (47%), and social media.

Online participation is steady as 4 in 10 ACT audiences continue to engage in digital arts activities

Though the rate of online participation among ACT audiences has declined since November 2021 (51%), 4 in 10 (38%) are participating in online arts and cultural activities in October 2022, down slightly from March 2022 (45%).

Of the 38% of ACT respondents who participated in an online activity in the fortnight before data collection, activities included watching a pre-recorded video of a performance or event (19%), doing online classes/courses/tutorials (19%), and watching a live-streamed performance or event (12%). A small proportion attended a virtual exhibition or museum/gallery tour (4%) or created content to share online (4%).

Online participation is high among ACT audiences over 75 (47%), those who are vulnerable to COVID-19 (51%), audiences with disability (51%), and those who are more cautious about the risk of the virus (52%).

This data confirms a strong case for digital events to be part of organisations' Disability Action Plans.

Among the proportion of ACT digital arts attendees, one-third (33%) paid for an activity in the fortnight before data collection, down slightly from 38% in March 2022. Just 30% of those paying spent over \$50, down from 54% in March 2022.

3 in 4 see a role for digital experiences in their life, confirming its importance in overcoming barriers to live attendance

When asked about access requirements that would be 'helpful for attending cultural events', 15% of all ACT audiences said that an option for digital participation would be helpful – confirming the need for digital programs to continue.

When asked about online arts and culture, overall a significant proportion (74%) continue to say that these experiences will play a role – either small (55%) or substantial (19%). This is relatively consistent with the March 2022 result (78%). One respondent said:

‘I am so grateful for organisers who include online even though in-person is possible so that those of us who do not want to get COVID can still participate in life in other ways.’

Another said,

‘I want this so much. I am 75. To go to a matinee in Sydney I have to get up at 4.30 am to catch a train there and then coming back on a train getting in about 11pm at night. It is too much.’

Look out for the upcoming fact sheet on audience accessibility, which will explore the October 2022 findings and opportunities related to audiences with access needs.

The role of the arts in recovery

Returning to cultural events has enabled recent attendees to feel connected, inspired, and enriched

In October 2022, recent attendees were asked, ‘What has it been like to return to the arts after COVID? What did you discover you missed?’

ACT audiences commonly expressed their renewed appreciation for attending live events. One said,

‘It has been uplifting, like finding my soul again. I missed experiencing performers and artists share their amazing talents. I missed feeling moved by live performance.’

Another said,

‘Being able to see exhibits in person and slowly wander around museums has been so relaxing. Online tours just don't have the same connection.’

Returning to the social aspect of cultural events has led to a recovered sense of connection. One commented:

‘SO SO GOOD. I missed the vibe of sharing an experience with other people. And live applause and live laughter!! Makes me so happy and connected to my community.’

Some respondents expressed mixed emotions about being able to re-attend and adjusting to public life once again. One said,

‘It has been less fun because nervous reluctance, but it is like returning to visit an old friend.’

ACT audiences are eager to support artists and cultural organisations as they rebuild

Looking ahead in the recovery process, audiences shared a range of positive messages for arts and cultural organisations.

As audiences grow more confident in attending – some are conscious of the new challenges facing both audiences and arts organisations. One mentioned the importance of facilitating connection and social experiences:

‘The challenge is... how do you break the relatively lazy lifestyle habits picked up during COVID-19 lockdowns and restrictions? It's my observation that many people have become insular and somewhat anti-social. Many people no longer like or tolerate crowds.’

Others expressed the need to continue factoring access and inclusion in programming, as one said,

‘Please be mindful that people with disabilities love performances and the arts too. Please make your events as accessible as possible. Keep in mind that people with disabilities are very anxious about getting COVID... The pandemic is not over for us!’

Many expressed a need for better options for price sensitivity, as one said,

‘Recognise that audiences have become accustomed to digital and hybrid options and are more likely to make last minute bookings. Clearly this impacts financial planning, so perhaps some sweeteners can be offered to people who subscribe or book early. It's difficult, though, to plan in this environment.’

Some shared words of encouragement as they acknowledged the cautious optimism in the community. One suggested,

‘So tough for these amazing orgs and artists!! Hang in there PLEASE!! I'm seeing people relaxing more about the virus and being less cautious so one hopes this filters through soon. Strength to you!!!’

Audiences are eager to show their support – and encourage artists and cultural organisations to continue advocating for themselves and their peers as the sector rebuilds. One said,

‘Keep using your talents and performing to the best of your ability on all avenues available. Don't be afraid to ask for support (from the public) in the way of financial, participation & spectating.’

What's next

To read about the story so far, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19.

There, you can also access a dynamic dashboard to help you explore the results by location, artform, and other variables. Instructions and tips for using the dashboard are available in a short video.

To receive future Snapshot Reports, Fact Sheets and resources in your inbox, as soon as they are available, you can opt in to receive Audience Outlook Monitor news at the link above.

If you have a question, or an idea to put forward, relating to this study, you can contact info@thepatternmakers.com.au.

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